



# IV-E Foster Care – Create Ongoing Step Action Table



## User

IV-E Worker.

## Process

These step action tables describe the actions needed to manually create, view, and edit an Ongoing Determination for a specific client.

## Introduction

- A **Save** button is available at both the top and bottom of the **Ongoing Determination** page. To complete the Determination, you must click **Save**.
- The icons next to the options in the left navigation panel will show colors to indicate progress in the Determination. **Notes** and **Entitlements** are always Gray.
  - **Gray** indicates that this section is not started or started but not completed.
  - **Green** indicates that this section is completed and that the child may meet IV-E Eligibility requirements within that section, but final determination may depend on answers in other sections.
  - **Red** indicates that this section is completed and indicates that the child does not meet IV-E Eligibility requirements based on answers within this section.
- The County filters default to the primary county associated with the worker who opens the page. The picklists contain all of the counties associated to the worker.

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## Create an Ongoing Determination:

- An Ongoing Determination is needed for a child with a IV-E Eligibility status of IV-E Eligible, Interrupt, or Eligible not claimable and who meets one of the following conditions:
  - A child moving from a certified/licensed placement setting to a non-certified placement.
  - A child moving from a non-certified placement to a licensed or certified placement.
  - A child moving from a certified/licensed placement setting to a Hospitalization, Detention or Runaway that lasts longer than 30 days.
  - A child returning/discharged from a Hospitalization, Detention, or Runaway status that lasted longer than 30 days.
  - A trial home visit lasting longer than 6 months, based on the start date of the Trial Home Visit service auth.
  - A child turning 18 while in out-of-home care. Triggered on the first day of month of 18th birthday.

When these conditions are met, it is the responsibility of the IV-E Worker to manually create a new Ongoing Determination.

- Any field can be used to search for a Client in the Search Queries.
- If a child is selected who already has an existing Ongoing Determination that has not been accepted, a message displays stating *“An open Ongoing Determination already exists for this child. Go to the Pending Determinations List and select and complete this determination before trying to create a new Ongoing Determination.”*

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## Create an Ongoing Determination

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Step	Action
1	In the <i>Left Navigation</i> panel. <ul style="list-style-type: none"> <li>● Click <b>IV-E Foster Care</b>.</li> <li>● Click <b>Create Ongoing</b>.</li> </ul>
2	In the <i>IV-E Create Ongoing – Select Client</i> table. <ul style="list-style-type: none"> <li>● Click the <b>Client ID</b> field.</li> <li>● Type the Client ID .</li> <li>● Click <b>Search</b>. The client information will display below the Search table.</li> </ul>

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3	<p>From the filtered list.</p> <ul style="list-style-type: none"><li>• Click in the Client Information row to highlight the row.</li><li>• Click <b>Select &amp; Create Ongoing Determination</b>.</li></ul>
4	<p>This opens the <i>Create Ongoing Determination</i> pop-up window.</p> <ul style="list-style-type: none"><li>• Click the <b>County*</b> drop-down arrow.</li><li>• Select the appropriate option.</li><li>• Click the <b>Event Type*</b> drop-down arrow.</li><li>• Select the appropriate option.</li><li>• Click in the <b>Date of Event*</b> field.</li><li>• Type the date with a MM/DD/YYYY format or enter the date using the calendar option.</li><li>• If required, click the <b>Open Removal*</b> drop-down arrow.</li><li>• Select the appropriate option.</li><li>• Click <b>Continue to Ongoing Details</b> when finished or <b>Cancel</b> to close without saving.</li><li>• This will open a new <i>Foster Care Ongoing Determination</i>.</li></ul>
5	<ul style="list-style-type: none"><li>• Continue from Step 5 of the <b>Initiate an Ongoing Determination</b> (below) to Initiate the Determination and complete the form.</li></ul>



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## Initiate an Ongoing Determination:

- The County/Agency filter defaults to the primary county or agency associated with the worker who opens the page. The picklist contains all of the counties and/or agencies associated to the worker.

### Initiate an Ongoing Determination

Step	Action
1	<p>In the <i>Left Navigation</i> panel.</p> <ul style="list-style-type: none"> <li>• Click <b>IV-E Foster Care</b>.</li> <li>• Click <b>All Determinations</b>.</li> </ul>
2	<p>In the <i>IV-E All Determinations</i> table.</p> <ul style="list-style-type: none"> <li>• Click the <b>Type</b> drop-down arrow.</li> <li>• Select <b>Ongoing</b>.</li> <li>• Click the <b>Status</b> drop-down arrow.</li> <li>• Select <b>Not Started</b>.</li> <li>• Click the <b>County</b> drop-down arrow.</li> <li>• Select the appropriate County option.</li> </ul>
3	<p>From the filtered list in the <i>IV-All Determinations</i> table.</p> <ul style="list-style-type: none"> <li>• Click the date link under <b>Due Date</b> to open the desired Foster Care Ongoing Determination page.</li> </ul>
4	<p>This opens the <i>Foster Care Ongoing Determination</i> page for the selected client.</p> <ul style="list-style-type: none"> <li>• Navigate through the Foster Care Ongoing Determination page using either the options in the left Navigation panel or the scroll bars.</li> </ul>



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In the header for *Demographics*.

- Click **Actions**.
- Select **Initiate Ongoing Determination**.

This will open the **Add required information** pop-up window.

- Click the **Event Type\*** drop-down arrow.
- Select the appropriate option.
- Click in the **Date of Event\*** field.
- Type the date with a MM/DD/YYYY format or enter the date using the calendar option.
- Click **Save** when finished or **Back** to return to the *IV-E All Determinations* table without saving. This will Initiate the Ongoing Determination.



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## Demographics:

- The name displayed in the **Child/Youth Name** column contains a link to open the Client Details record for the child.
- The names displayed under **Caretaker A** and **Caretaker B** are links that will open the Client Details record for the caretaker.
- If the **Not Needed** checkbox is checked, the redetermination would be flagged as deleted and not show in Pending or Redeterminations Needed lists. This will also end some of the open IV-E eligible entitlements.

## Demographics

Step	Action
1	<p>In the <b>Demographics</b> section.</p> <ul style="list-style-type: none"> <li>• If required, click in the <b>Determination Assigned To</b> field to edit the name of the worker assigned to this Redetermination.</li> <li>• Select the desired name from the list.</li> <li>• If the <b>Not Needed</b> checkbox is checked, the following fields become visible and required. <ul style="list-style-type: none"> <li>○ Click <b>Reason Not Needed</b>.</li> <li>○ Select the appropriate option from the list.</li> <li>○ Click in the <b>Comments</b> text box.</li> <li>○ Enter appropriate comments.</li> </ul> </li> <li>• Click in the <b>Not Needed</b> checkbox to deselect Not Needed and continue with the Ongoing Determination.</li> </ul>
2	<p>If the youth is 18 or will be 18 as of the Determination due date, a section displays with the question <b>Is this youth expected to graduate from high school by their 19<sup>th</sup> birthday?</b></p> <ul style="list-style-type: none"> <li>• Click Yes or No toggle <ul style="list-style-type: none"> <li>○ If <b>No</b>, then child is not IV-E eligible as of the last day of the month of their 18<sup>th</sup> birthday. The section will turn red on the Navigation pane.</li> <li>○ If <b>Yes</b>, the <b>What is the expected month and year of their graduation?</b> date field displays and is required.</li> <li>○ Click the date link and type the date with a MM/DD/YYYY format or enter the date using the calendar option.</li> </ul> </li> </ul>
3	<p>Click <b>Save</b> at the top or bottom of the page to save your information and continue.</p>



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4	Use the links in the left navigation panel or the scroll bar to continue to the <b>Claimability</b> section.
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## Claimability

- The Claimability section displays Placement History list which shows all OOH placements for the child.
- The Status indicator for the Claimability section will always be green.

### Claimability

Step	Action
1	<p>In the <b>Filters</b> section.</p> <ul style="list-style-type: none"> <li>• Click the <b>View</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> </ul>
2	<p>In the <b>Placements List</b>.</p> <p><b>Note:</b> If the required restrictions are met, the <b>State Date</b> will become a link to open the Service Authorization detail panel. Otherwise, all fields are read-only.</p>
3	<p>Use the links in the left navigation panel or the scroll bar to continue to the <b>Eligibility and Claimability Summary</b> section.</p>





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## Eligibility and Claimability Summary

- The *Accept Eligibility and Claimability* cannot be executed until all determination factors have been completed. If any determination factors are not complete, a message will display stating: “One or more Determination Factors are incomplete”.
- If the Claimability Determination Override checkbox is checked, then Override Status, Override Date and Override reason become enabled and required.

## Eligibility and Claimability Summary

Step	Action
1	<p><b>Accept Eligibility and Claimability</b></p> <p>In the <b>Eligibility and Claimability</b> section header.</p> <ul style="list-style-type: none"> <li>• Click <b>Actions</b>.</li> <li>• Select <b>Accept Eligibility and Claimability</b>. If all requirements for the Determination are met, a pop-up window will display.</li> <li>• Click <b>Lock</b> for <i>Do you want to continue?</i> or click <b>Cancel</b> to close the pop-up window and not lock the record.</li> </ul>
2	<p><b>Unlock Determination</b></p> <p>If the record is locked, selecting <b>Unlock Determination</b> will unlock the record, and return it to Pending Determinations.</p> <ul style="list-style-type: none"> <li>• Click <b>Actions</b>.</li> <li>• Select <b>Unlock Determination</b>.</li> <li>• Click <b>Unlock</b> or <b>Cancel</b> to close and not unlock the record.</li> </ul>
3	<p><b>Claimability Determination</b></p> <ul style="list-style-type: none"> <li>• Click <b>Override</b> checkbox.</li> <li>• Click the <b>New Claimability Status</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click in the <b>Override Reason</b> field. A Reason is required if the Override Checkbox is checked.</li> </ul>
4	Click <b>Save</b> at the top or bottom of the page to save your information and continue.
5	Use the links in the left navigation panel or the scroll bar to continue to the <b>Notes</b> section.



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## Notes

- In the **Note Summary** section, the **Created Date**, **Created By**, **Updated Date**, and **Updated By** are auto-filled and cannot be edited.

## Notes

Step	Action
1	<p><b>Add a Note</b></p> <p>In the <b>Notes</b> section header.</p> <ul style="list-style-type: none"> <li>• Click <b>Actions</b>.</li> <li>• Select <b>Add Note</b>.</li> </ul> <p>This opens the <b>Note Summary</b> page.</p>
2	<p>In the <b>Note Summary</b> section.</p> <ul style="list-style-type: none"> <li>• Click in the <b>Date Occurred</b> field.</li> <li>• Type the date with a MM/DD/YYYY format or enter the date using the calendar option.</li> <li>• Click in the <b>Time Occurred</b> field.</li> <li>• Use the up and/or down time spinners to change the time.</li> <li>• Click in the <b>Completed By</b> field and scroll-over the name displayed.</li> <li>• Type the name in the field.</li> <li>• Click the <b>County/Agency</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click the <b>Purpose</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click the <b>Method</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click the <b>Location</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click the <b>Status</b> drop-down arrow.</li> <li>• Select the appropriate option from the list.</li> <li>• Click In the <b>Comments/Summary</b> text box. Comments are required.</li> <li>• Enter appropriate comments.</li> <li>• When all Notes are completed, select <b>Save and Return to IV-E Eligibility</b> to save the changes or <b>Cancel</b> to exit without saving.</li> </ul>



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3	<p><b>Edit a Note</b></p> <p>In the <b>Note Summary</b> section.</p> <ul style="list-style-type: none"><li>• Click the link for the <b>Entered Date</b>. This will open the Note Summary section.</li><li>• Make edits as needed.</li><li>• Select <b>Save &amp; Return to IV-E Eligibility</b> to add the changes or <b>Cancel</b> to exit without saving.</li></ul>
4	<p><b>Delete a Note</b></p> <p>In the <b>Note Summary</b> section.</p> <ul style="list-style-type: none"><li>• Click the link for the <b>Entered Date</b>. This will open the Note Summary section.</li><li>• Select <b>Delete</b> to delete the Note.</li><li>• In the <b>Warning</b> pop-up window, click <b>Yes</b> to delete the Note or <b>No</b> to cancel without deleting.</li></ul>
5	<p>Click <b>Save</b> at the top or bottom of the page to save your information and continue.</p>
6	<p>Use the links in the left navigation panel or the scroll bar to continue to the <b>Entitlements</b> section.</p>



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## Entitlements

- The **Entitlements** page can also be accessed from the Client Details page.

Entitlements	
Step	Action
1	<p>In the <b>Entitlements</b> section.</p> <ul style="list-style-type: none"> <li>Click the <b>Filter By:</b> drop-down arrow.</li> <li>Select the appropriate filter option.</li> </ul> <p>This will display the filtered Entitlements in the table.</p>
2	<p><b>Add an Entitlement</b></p> <p>In the <b>Entitlement</b> section header.</p> <ul style="list-style-type: none"> <li>Click <b>Actions</b>.</li> <li>Select <b>Add Entitlement</b>.</li> </ul> <p>This opens the <b>Add Entitlement</b> pop-up window.</p> <ul style="list-style-type: none"> <li>Click in the <b>Start Date</b> field.</li> <li>Type the date with a MM/DD/YYYY format or enter the date using the calendar option.</li> <li>If applicable, click in the <b>End Date</b> field.</li> <li>Type the date with a MM/DD/YYYY format or enter the date using the calendar option.</li> <li>Click the <b>Entitlement</b> drop-down arrow.</li> <li>Select the appropriate option from the list.</li> <li>Click the <b>County/Agency*</b> drop-down arrow.</li> <li>Select the appropriate option from the list.</li> <li>Click the <b>Status*</b> drop-down arrow.</li> <li>Select the appropriate option from the list.</li> <li>Click In the <b>Comments</b> text box.</li> <li>Enter appropriate comments.</li> <li>Click <b>Add</b> when finished or <b>Cancel</b> to close without saving.</li> </ul>
3	<p><b>Edit an Entitlement</b></p> <p>In the <b>Entitlements</b> section.</p> <ul style="list-style-type: none"> <li>Click the link for the <b>Start Date</b>. This will open the Edit Entitlement pop-up window.</li> <li>Make edits as needed.</li> <li>Select <b>Save</b> to add the changes or <b>Cancel</b> to exit without saving.</li> </ul>



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4	<p><b>Delete an Entitlement</b></p> <p>In the <b>Entitlements</b> section.</p> <ul style="list-style-type: none"><li>• Click the link for the <b>Start Date</b>. This will open the Edit Entitlement pop-up window.</li><li>• Select <b>Delete</b> to delete the Entitlement.</li><li>• In the <b>Warning</b> pop-up window, click <b>Yes, Delete</b> to delete the Note or <b>Cancel</b> to cancel without deleting.</li></ul>
5	<p>Click <b>Save</b> at the top or bottom of the page to save your information and continue.</p>